

I-SMART Data Reporting for Assessment-Only Agencies

A brief outline of the I-SMART data entry process for a client who received a Placement Screening (Assessment) is below.

Client Profile
Intake
Crisis and Placement Screening
Program Enrollment: Assessment Program
Encounter Note
Program Enrollment: Unenroll from Assessment Program
Intake: Save and Close Case

The above constitutes a complete Case or Episode of Care if the client is not being admitted for treatment. Closing the Case at the Intake screen will close the Episode.

In order to complete the state-required fields in I-SMART, complete the required fields (Dark and Soft Yellow only) in each of the following modules and screens.

Placement Screening/OWI Assessment

- **Client List:** If client already exists in database as a Closed Case, choose client's **Activity List** hyperlink under **Actions** and **Start New Episode**. Or, if client does not already exist in the database, **Add Client**.

Client Search

Agency: Iowa Dept. of Public Health

Facility: [Dropdown]

First Name: [Text Box] Last Name: [Text Box]

SSN: [Text Box] DOB: [Text Box]

Client ID: [Text Box] Provider Client ID: [Text Box]

Staff: [Dropdown] Primary Care Staff: [Text Box]

Case Status: All Clients [Dropdown]

Clear Go

Client List [Export](#) [Add Client](#)

Client ID	Full Name	DOB	SSN	Gender	Actions
8801013456	20 test, Dec	1/1/1988	999-12-3456	Female	Profile Activity List
9710108548	Admission, TEDS	10/10/1987	485-47-8548	Male	Profile Activity List
6206087414	Admission10, TEDS	6/8/1962	632-14-7414	Female	Profile Activity List
7604079654	Admission11, TEDS	4/7/1976	231-58-9654	Male	Profile Activity List
6905035236	Admission12, TEDS	5/3/1969	415-78-5236	Male	Profile Activity List
6501026321	Admission2, TEDS	1/2/1965	524-89-6321	Female	Profile Activity List
7810150289	Admission3, TEDS	10/15/1976	258-98-0289	Male	Profile Activity List

Clients with Consents from Outside Agencies

Agency	Client Id	Client Name	DOB	SSN	Gender	Actions
Southeastern Community College	8001016789	Redneck, Jimmy Bob	1/1/1980	123-45-6789	Male	Activity List
Test Agency IDPH	6610223254	Test, Client	10/22/1966	125-96-3254	Female	Activity List

- **Add Client** will take you to the **Client Profile** screen.

- **Client Profile**

- ✓ **Social Security #:** If the client has no SS# or if it is unknown, the user can create a number by using the format 999-00-0001, 999-00-0002, etc., where the first three numbers are always 999. The agency will have to keep track of SS# 's it creates.

❖ **NEXT** button will take you to the **Additional Information** screen.

- **Additional Information**

❖ **Next** will take you to the **Contact Info** screen.

- **Contact Info**

- ✓ **Home Phone #:** If no phone, enter 0000000000 (10 zero's).

Contact Info

Home Phone # 909-909-0909 Created 7/17/2008 8:27 AM
 Work Phone # Updated 7/17/2008 8:27 AM
 Mobile Phone #
 Other Phone #
 Fax #
 Email Address

Addresses [Add Address](#)

Address Type	Address	Confidential	Created	Updated	Actions

Cancel Save Finish Previous Next

- ✓ **Add Address** will open the Address Information page. (See next page)

Address Information

Address Type Confidential No
 Address Line 1*
 Address Line 2
 City* State* Zip*
 Cancel Finish

- Complete the **Address Information** screen and click **Finish**.

- ❖ **Finish** will take you back to the **Contact Info** screen.
- ❖ **Finish** on the Contact Info screen will take you to the **Client List** screen.

- **Activity List:** In the left, choose **Activity List** link. This will open the client's **Episode List** screen. If it does not, navigate to the Episode List screen using the left menu. Click **Start New Episode**.

Please select a case, or click Start New Episode.

Episode List for Example, Data [Start New Episode](#)

Case #	Status	Facility	Intake By	Intake Date	Closed Date	Actions

- **Start New Episode** will open the **Intake Case Information** screen.
- ✓ **Initial Contact:** How did the client first contact the agency? Usually the response is by phone.
- ✓ **Date of First Contact** will be the date of that phone call.
- ✓ **Special Initiatives** are projects funded by either Magellan or IDPH. Most users should enter **None** in this box.
- ✓ Complete the screen and Click **Finish**.

❖ **Finish** will take you to the Client's **Activity List** screen. The **Activity List** screen shows the user what data elements s/he has completed in the client file.

- **Placement Screening:** At the left hand menu choose **Crisis and Placement**.
- ✓ Choose **Add New Placement Screening**. This will open the Placement Screening Profile screen.

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I-SMART Training

User: Coordinator, Data
 Loc: Iowa Dept. of Public Health, Test Facility
 Client: Example, Data | 4810090324 | Case #: 1

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Placement Screening/OWI Profile

Full Name: Example, Data County of Res. Appanoose

Referral Source: OWI Race: American

Gender: Female Ethnicity: American

DOB: 10/9/1948 Age: 59

Basis for Decision

Potential Client for SA
 Potential Client for MH
 Potential Client for TBI

Treating Here For: 1-SA
 Est. Duration of TX (days)
 Days Waiting: 2

Client Type
 Admission Type
 Admission Staff: Coordinator, Data
 Placement Screening Date: 3/17/2008
 Screening/Admission for Concerned Person: No
 Crisis Intervention Date

of Prior SA TX Admissions in the Last 10 Years: 0
 # of Non-TX SA Related Hospitalizations in Past 6 Months: 0
 # of Prior MH TX Admissions: 0
 # of Prior MH Hospitalizations: 0
 # of Months Since Last Discharge: 0

Past IV Drug Use: No
 Mental Health Problem: No
 Methadone Maintenance Planned: No
 Education: 14-14 Years
 Veteran Status: 0-None
 Pregnant: No Due Date

Cancel Save Finish Next

- **Days Waiting:** Difference between the **Date of First Contact** on the Intake screen and the **Placement Screening Date**.
- **Placement Screening Date:** Date the Assessment was completed.
- **Screening/Admission for Concerned Person** response is almost always **No**. Choose **Yes** only if you are screening a friend/family member of a substance abuse client.
 - ❖ **Next** will take you to the **Financial/Household** screen.
- **Financial/Household**

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Client Placement Screening/OWI for Example, Data

Financial Info

Employment Status: NL02-Student Primary Income Src: 11-Wages/Salary

Months Emp in Last 6 Months: 6 Expected Payment Src: 11-Client Self Pay

Employer: Occupation: 2-Sales/Clerical Insurance Type: Blue Cross/Blue Shield

Annual Household Income: Client's Monthly Gross: \$6,866.00

Covers Substance Abuse Treatment: Yes

Other Income Sources: 00-None 11-Wages/Salary 13-Public Assistance

Other Income Sources Selected: 12-Family/Friends

Household Composition

Household Composition: Living Arrangement: 13-With significant other

Marital Status: 2-Married

of People Living With Client: # of Children Under 17 Living/Not Living w/Client: # of Children Spent Last 6 Mos Living w/Client: Children Living With Someone Else Because of Protection Order

Relation to Client: Aunt(s) Brother(s) Daughter(s)

Living with Client

Cancel Save Finish Previous Next

- ❖ **Next** takes the user to the **Substance Abuse** screen.

- **Substance Abuse**

Substance Abuse

Rank	Substance	Severity	Frequency	Method
Primary:	21-Alcohol		12-1 to 2 times per week	1-Oral
Secondary:	22-Cocaine/Crack		12-1 to 2 times per week	2-Smoking
Tertiary:	00-None	N/A	N/A	N/A

Was the Substance prescribed to the client?
 Primary: No Secondary: No Tertiary: N/A

At what age did the client FIRST use the substances indicated above (if unknown, enter "97"; if not applicable, enter "98"):
 Primary: 14 Secondary: 23 Tertiary: 98

of DAYS since LAST use of the substances indicated above: Primary: Secondary: Tertiary:

of Days Abstinent in Last 30 Days: Other Addictions: Selected Other Addictions: 0-None

of Days in Support Group in Last 30 Days: 5-Gambling 3-Compulsive Disorder 4-Eating Disorder 6-Other

of Days Attended AA/NA/Similar Meetings in Last 30 Days: Does Client Currently Use Tobacco? 2-Cigars or Pipes

of Days of Work/School Missed in Last 6 mo. Due to SA Related Problems: Daily Frequency of Cigarette Use No Cigarette use

Last SA Env. in Last 10 Yrs: 00-No Previous Admission

Comments:

Cancel Save Finish Previous Next

✓ Note that the maximum number entered in the “# of Days Attended AA/NA/Similar Meeting in Last 30 Days” is 30.

❖ **Next** will take the user to the **Legal History** screen.

- **Legal History**

Legal History

Legal Status: None/No Involvement No Response Commitment Court order for observation and evaluation

Selected Legal Status:

of Arrests in Lifetime: # of Arrests in Past 12 Months: # of Arrests in Past 30 Days: 1

OVI in the last 12 months: 1

Non-drug or alcohol-related crime while under the influence in the last 12 months: 0

Non-drug or alcohol-related crime while not under the influence in the last 12 months: 0

Drug or alcohol-related crime in the last 12 months: 0

Comments:

Cancel Save Finish Previous Next

❖ **Next** takes the user to the **ASAM** screen.

- **ASAM:** When doing a **Placement Screening/OWI** only the **Recommended Environment** is required.

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ASAM - PPC2R

Dimension	Level of Risk	Level of Care	Comments
1 - Acute Intoxication and/or Withdrawal Potential			
2 - Biomedical Conditions and Complications			
3 - Emotional, Behavioral, or Cognitive Conditions and Complications			
4 - Readiness to Change			
5 - Relapse, Continued Use, or Continued Problem Potential			
6 - Recovery / Living Environment			

Recommended Environment: 19-Extended outpatient
Clinical Override:
Actual Environment:
Comments:
[ASAM Notes](#) Cancel Save Finish Previous

- ❖ **Finish** will take the user to the client's **Activity List** screen showing the current Placement Screening.

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Crisis and Placement Screening List

[Add New Crisis Record](#)
[Add New Placement Screening](#)

Record Type	Crisis or Placement Screening Date	Created By	Updated By	Actions
Placement Screening/OWI	3/17/2008	Coordinator, Data	Coordinator, Data	Review

- **Program Enrollment:** User must enroll the client in a program to record the services delivered. **Program Enroll** in the left-hand menu will open the Program Enrollment list screen.

- ✓ Choose **Add Enrollment** to open the Program Enrollment screen.

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Program Enrollment

[Add Enrollment](#)

Program Name	Start Date	End Date	Facility	Notes	Actions

Finish Previous Next

- ✓ **Add Enrollment:** This will open the enrollment screen for editing.

Program Enrollment Profile

Facility: Test Facility

Program Name: Assessment

Program Staff: Coordinator, Data

Start Date: 3/17/2008

End Date: 3/17/2008

Termination Reason: Assessment Completed

Notes:

Buttons: Cancel, Save, Finish

- ✓ **Program Name:** Choose **Assessment** program.
- ✓ **Program Staff:** The name chosen is up to the user.
- ✓ **Start Date:** Note the Start Date of the program enrollment will default to today's date. User must change it to the date of the assessment.
- ✓ **End Date:** The date the client was last seen during the assessment. Usually the same as Start Date.
- ✓ **Reason for Termination:** **Assessment Completed.**
- ❖ **Finish** will close the screen and place the Program Name and other info on the **Program Enrollment List** as shown below.

Program Enrollment List

Program Name	Start Date	End Date	Facility	Notes	Actions
Assessment	3/17/2008	3/17/2008	Test Facility		Review Delete

Buttons: Finish, Previous, Next

- ❖ **Finish:** This will take the user to the **Activity List** screen.

Client Activity List

Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	3/17/2008	7/17/2008	Completed	Review
Intake Transaction	3/17/2008	7/17/2008	Completed	Review
Client Program Enrollment (Assessment)	3/17/2008	7/17/2008	Completed	Review
Placement Screening	3/17/2008	7/17/2008	Completed	Review

Buttons: Review, Previous, Next

- **Notes:** From the left menu, choose **Notes**; then choose **Add New Billable Note**.

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Notes List

[Add New Billable Note](#)
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Note Type	Date	Duration	Staff	Service/Summary	Actions

- **Encounter Profile**

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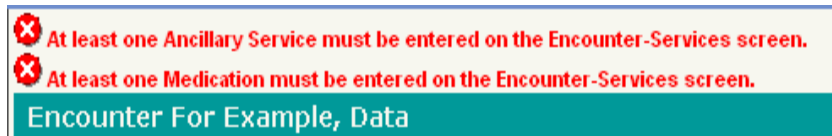
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At least one Ancillary Service must be entered on the Encounter-Services screen.
At least one Medication must be entered on the Encounter-Services screen.

Encounter For Example, Data

Encounter Type: Individual Notes Event Type: Placement Screening/O
Tx ID: Created Date:
Service: 90801 - Psychiatric diagnostic interview examination
Program Name: 19-Assessment : 3/17/2008 - 3/17/2008
Start Date: 3/17/2008 End Date: 3/17/2008
Start Time: End Time:
Service Location: Office
Substance Abuse Medication: Medication Free Duration: 60 Min
Emergency: # of Sessions: 1
Rendering Staff: Coordinator, Data Primary Payment Src: 11-Client Self Pay
Supervising Staff: Other Payment Src: 10-NA No Other Pay Source
Referring Phys:
Cancel Save Finish Next

- ✓ **Encounter Type:** Individual Note
- ✓ **Event Type:** Placement Screening/OWI
- ✓ **Service:** 90801
- ✓ **Program Name:** Assessment
- ✓ **Service Location:** Defaults to location specified when the facility is set up. Most users prefer this to default to Office. Contact IDPH for this option.
- ✓ **Substance Abuse Medication:** usually **Medication Free** unless client is taking Methadone, Antabuse or some other drug prescribed to help inhibit drug use.
- ✓ **Start Date** and **End Date** are usually the same date.
- ✓ **Duration:** enter length of session in minutes
- ✓ **# of Sessions:** usually 1
- ✓ **Primary Payment Src:** populated by the choice from **Admission** module.
- ✓ **Other Payment Src:** are any other sources providing payment for service?



The above alerts will appear if the user clicks Save. They are simply reminders to do the Ancillary Services screen next.

- ❖ **Next** will take the user to the **Ancillary Services** screen showing the current Placement Screening.

- **Ancillary Services**

- ✓ **Ancillary Services:** These are services the client receives while in treatment. They may be provided by either the treatment provider or an outside agency.
- ✓ **Medications/Frequency:** These relate to the **Substance Abuse Medication** field on the **Encounter** screen. Choose the appropriate medication listed. Remember, this is a listing of only those medications a client might use to inhibit his/her substance use. Do not list anti-depressants, anti-anxiety agents or other psychotropic medications a client might receive.

- ❖ **Finish** will return the user to the Encounter List screen.

- **Intake:** Using the left menu navigate to the **Intake** screen.

- ✓ If the client is being seen for only an assessment and will not be admitted to treatment, enter the end date of the **Placement Screening** in the **Date Closed** field and then choose the **Save & Close the Case** link. **Save & Close the Case** will change the screen to gray as above. This action closes the client file for editing and enables the user to identify the Placement Screening as a separate case number.
- ❖ **Finish** will return the user to the Activity List. Note that the user can now tell whether s/he has completed all required elements by looking at the Activity List. A completed Placement Screening (Assessment) data entry for any client should look like the list below with five activities completed.

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Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	3/17/2008	7/17/2008	Completed	Review
Intake Transaction	3/17/2008	7/17/2008	Completed	Review
Client Program Enrollment (Assessment)	3/17/2008	7/17/2008	Completed	Review
Encounter Summary	3/17/2008	3/17/2008	Not Applicable	Review
Placement Screening	3/17/2008	7/17/2008	Completed	Review